

# SMS 2022 Annual Report



# MESSAGE FROM THE PRESIDENT



**YAN  
ANTHEA  
ZHANG**  
SMS  
PRESIDENT



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Dear SMS Members,

As President of the Strategic Management Society (SMS), it is my pleasure to present this Annual Report and highlight some of the important achievements from 2022 as well as our strategic priorities for the future. After two virtual annual conferences, we finally reunited in person for the SMS Special Conference in Milan and the SMS 42nd Annual Conference in London (where 1,286 members joined us)! These conferences were a great success, especially considering the continued shadow of the Covid-19 pandemic. I want to thank the Program Chairs, the Conference Track Chairs, Interest Group & Community (IG&C) leaders, program volunteers, and SMS staff for their hard work and dedication.

As many of us have personally experienced, 2022 was a year with great financial challenges. Yet our Society's financials remain strong. The SMS endowment, combined with a stable membership base (which remains around 3,000) and conference registration revenue, allows us to weather environmental uncertainties and volatility while continuing – and even expanding – our services to our members.

Our journals remain a key foundation of SMS. Please join me in welcoming three Co-Editors beginning terms in 2023: Mary Benner at the *Strategic Management Journal (SMJ)*, Yong Li at the *Strategic Entrepreneurship Journal (SEJ)*, and Grazia Santangelo at the *Global Strategy Journal (GSJ)*. We thank Sendil Ethiraj at *SMJ*, Gary Dushnitsky at *SEJ*, and Ram Mudambi at *GSJ* for their exceptional contributions as Co-Editors.

We also welcome Mahka Moeen as Strategy Research Foundation (SRF) Co-Chair and thank Michael Leiblein for his dedication to this role during his tenure. Our new SRF grant policy, which includes up-front disbursements, will allow us to focus on collaboration with scholars to celebrate and promote their research. More than \$216,000 was distributed in 2022 to support exceptional scholars and their research efforts.

I want to thank several colleagues on the Board of Directors for their dedication and contributions to the Society. Africa Ariño completed her two-year presidential tenure, while Javier Gimeno completed his six-year rotation in the Executive Committee. Their leadership and dedication played an instrumental role in steering our Society through the turbulent times in recent years. We also appreciate the service of outgoing Treasurer Tomi Laamanen and Directors Julian Birkinshaw, Sharon Matusik, and Heli Wang and welcome new leadership to the Board, including Sekou Bermiss, Samina Karim, and Riitta Katila, as well as Myles Shaver, who will continue his long service to SMS in his role as President-Elect.

Looking forward, I want to highlight a few strategic priorities of our Society. First, we continue to develop better governance structures and policies. This includes initiatives such as adding non-Board members to various committees to improve accessibility, fairness, and transparency, creating Mission & Vision Statements to guide us into the future, and updating the SMS Code of Conduct to reflect current practices. Second, our strategy to engage with practitioners remains a top priority. Based upon extensive engagement with stakeholders, we identified “The Six Big Questions of Strategic Management.” The “Big Six” will serve as a “cornerstone” list of the fundamental issues affecting the strategy field and will be used to organize our activities and promote research to business leaders. SMS also launched the Explorer newsletter to promote practitioner-oriented articles containing content based on the groundbreaking research being published in SMS Journals, and we are grateful for the support of the SMS Media Innovations team in these efforts. Finally, expanding our geographic reach in order to provide a welcoming and inclusive platform for strategy scholars and practitioners from around the world continues to be a third strategic priority for SMS. Special Conferences that support this effort will be announced soon!

It is truly my honor to serve as your President. There are so many opportunities for you to engage in SMS activities. Let's work together to continue to expand the inclusivity and increase the impact of the Strategic Management Society.

Sincerely,

Yan Anthea Zhang  
SMS President

# 2022 BOARD OF DIRECTORS

## OFFICERS



**AFRICA  
ARIÑO**

*IESE Business School*  
President  
2021–2022



**YAN ANTHEA  
ZHANG**

*Rice University*  
President-Elect  
2021–2022



**JAVIER  
GIMENO**

*INSEAD*  
Past-President  
2021–2022



**TOMI  
LAAMANEN**

*University of St. Gallen*  
Treasurer  
2019–June 2022



**CRAIG  
CROSSLAND**

*University of Notre Dame*  
Treasurer  
June 2022–2025



**BARBARA  
GROBICKI**

*Strategic Management  
Society*  
Executive Director

## DIRECTORS-AT-LARGE



**JULIAN  
BIRKINSHAW**

*London Business  
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**CONSTANCE  
HEL FAT**

*Dartmouth College*



**ASEEM KAUL**

*University of  
Minnesota*



**GWENDOLYN  
LEE**

*University of Florida*



**PAUL MANG**

*Guidewire Software*



**SHARON  
MATUSIK**

*University of Michigan*



**GEORGE STALK  
JR**

*Boston Consulting  
Group*



**HELI WANG**

*Singapore  
Management  
University*

## OUTGOING BOARD MEMBERS

SMS recognizes and thanks outgoing SMS Board members **Javier Gimeno, Tomi Laamanen, Julian Birkinshaw, Sharon Matusik, and Heli Wang** for their years of outstanding service, support, and contributions to the organization.

# KEY STRATEGIC INITIATIVES

## SMS MISSION & VISION STATEMENTS

### MISSION:

The Strategic Management Society is the leading global member organization that fosters and supports rigorous and practice-engaged strategic management research and nurtures a vibrant and inclusive scholarly community.

### VISION:

The Strategic Management Society cultivates collaboration between academics and practitioners as a means of accelerating thought leadership in the field of strategic management. We nurture and disseminate cutting-edge research in order to advance the practice of strategic management, address economic challenges, and positively impact society around the world.

The Board appointed a special taskforce to review and create Mission and Vision statements for the Society in early 2022. With the intention of defining both the organization's business and objectives, as well as where the organization aspires to go, these statements will be used to guide programs and initiatives as the Society moves into the future.

## NEW SMS CODE OF CONDUCT

The SMS Board created an Ethics Review Taskforce to review the SMS Guidelines of Professional Conduct and ensure that these guidelines reflected current standards. The Taskforce was also directed to create a process for investigations should violations be reported. The new SMS Code of Conduct and SMS Investigation Process & Procedures were the result and are now available on the SMS website. As part of this review, a decision was made to sunset the Ombudsperson role, created in 2019 as a channel for members to bring forward complaints. After careful assessment, it was determined that SMS needed a more formal process that provided clear guidelines to handle situations that may arise. SMS is grateful to Dana Minbaeva for her service as Ombudsperson for the past three years and for her invaluable input into this decision.

## NON-BOARD MEMBERS SERVING ON BOARD COMMITTEES

Several committees of the SMS Board of Directors appointed additional, non-Board members to serve alongside Board members to oversee various SMS programs in 2022. The intention is to allow more voices to be included in the direction of the organization, increase transparency, and provide additional volunteer leadership opportunities to members. These appointments include journal co-editors and SRF Co-Chairs serving on the Publications and Research Committees, as well as seven members of the DEI Committee and three members of the Membership Committee: a PhD student representative, a representative from among the IG leaders, and a representative from the DEI Committee. We are grateful to these individuals for supporting the SMS and serving in these new roles.

## DIVERSITY, EQUITY, & INCLUSION COMMITTEE'S INAUGURAL YEAR

In its first year, the DEI Committee accomplished several initial priorities. A Charter and Purpose Statement was created to align committee members around a shared vision. This was followed by a project to collect and analyze existing data in order to establish baseline metrics for diversity, equity and inclusion within SMS and to identify areas of improvement. During the Awards nomination period, a subcommittee conducted outreach to past SMS Special Conference Chairs and several listservs inviting SMS Award nominations in order to diversify the candidate pool. At the Annual Conference, the committee presented a panel session to discuss DEI within our home institutions and on DEI within SMS. Finally, the committee began work on a web presence for the committee to share findings, updates, and activities.



*Cindy Devers speaks on the panel discussion on DEI within our home institutions.*

## MEDIA INNOVATIONS

### A REPORT BY MARVIN LIEBERMAN AND MATTHIAS WENZEL, MEDIA INNOVATIONS CO-CHAIRS



**Marvin Lieberman,**  
*University of California,  
Los Angeles*



**Matthias Wenzel**  
*Leuphana University of Lüneburg*

SMS Media Innovations (MI) harnesses digital media to disseminate SMS insights and engage the strategy community in conversations about strategic management. MI uses social networks (Twitter, LinkedIn, YouTube, and the SMS Explorer) to increase the resonance of SMS scholarship. In addition, the MI team organizes video abstracts on the SMS Explorer site and edits SMS Collections (bundles of previously published SMS articles that center around a selected topic with an original introduction), which serve as a knowledge repository for debates both online and in print. As of January 2023, SMS has 9,005 followers on Twitter (up 9%); 13,460 members on LinkedIn (up 4%); and 2,750 subscribers on YouTube (up 25%). In addition, in 2022, posts on the SMS Explorer were viewed 18,645 times (up 90% since last year). The combined media footprint suggests significant global and intellectual reach.

The following SMS Collections were published in 2022: “Emerging Market Multinational Enterprises” edited by Torben Pedersen and Stephen Tallman; and “Top Management Team Role Structure: A Vantage Point for Advancing Upper Echelons Research” edited by Shenghui Ma, Yasemin Kor, and David Seidl.

Thank you to our Social Media Team, Niloofer Abolfathi, Jarryd Daymond, Stefanie Habersang, Renate Kratochvil, and Sarah Stanske.

#### 2021 VIDEO ABSTRACT AWARD

##### Replication Using Templates

Megan Lawrence, *Vanderbilt University*

Based on the article: “Replication using templates: Does the unit learn from itself, the template, or both?” *Strategic Management Journal*, 41(11), 1955-1982.

## A REFRESHED SMS BRAND



In 2022, the SMS Office, with input from various SMS stakeholders, worked with a design firm to refresh the Society’s branding including the SMS logo, various

program logos, and overall color palette. This refreshed branding will be introduced throughout 2023 on a rolling basis, culminating with the reveal of the redesigned SMS website towards the end of 2023. Read the full story [here](#).

## SMS EXPLORER NEWSLETTER



The SMS Explorer provides a window into the SMS Journals’ scholarly insights. The [Explorer website](#) and monthly newsletter provide practitioner-friendly summaries of *SEJ*, *SMJ*, and *GSJ* research that can help managers run their companies more effectively.

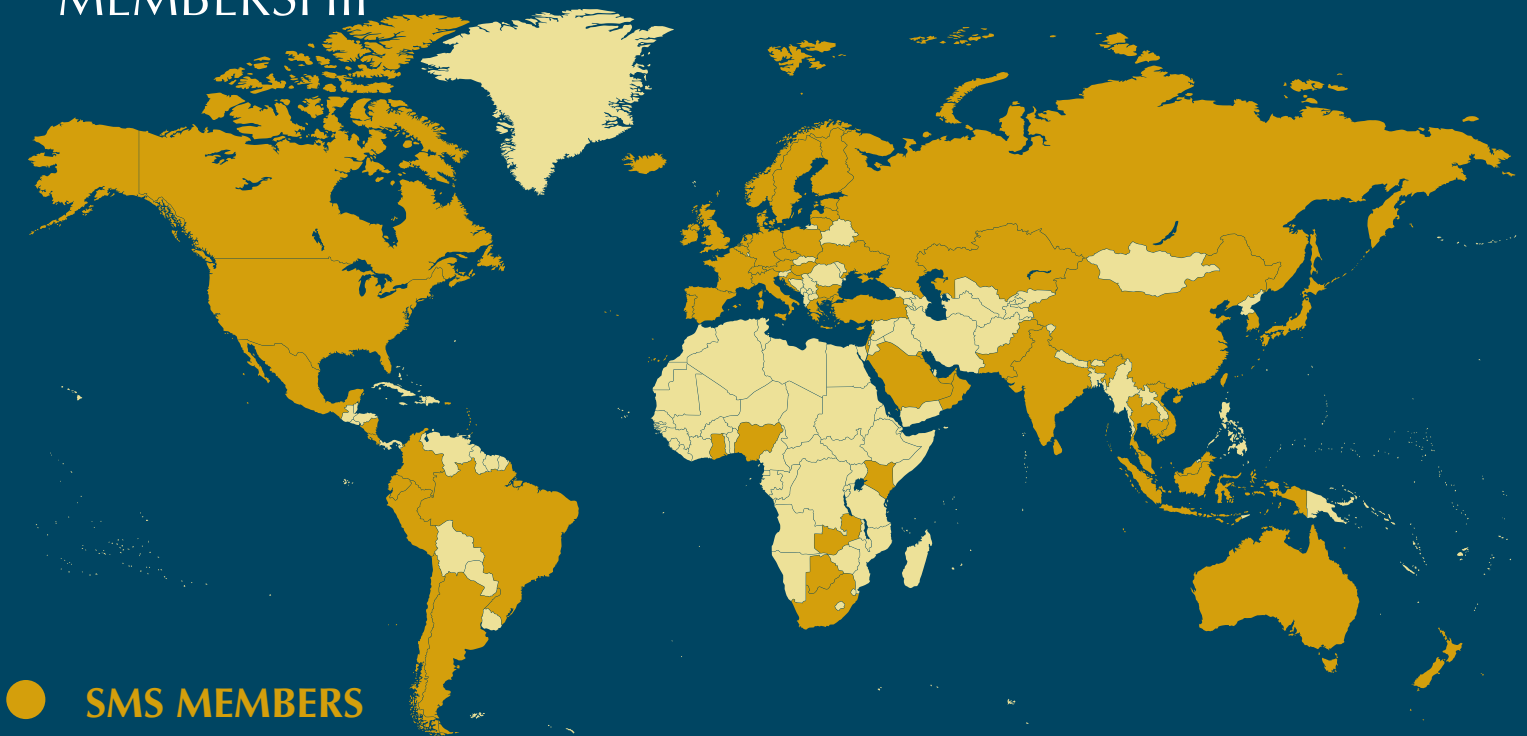
## THE SIX BIG QUESTIONS OF STRATEGIC MANAGEMENT

Over the course of 2022, the Practitioner Strategy Committee of the Board of Directors developed “[The Six Big Questions of Strategic Management](#)” after extensive engagement with many SMS stakeholders. This process included a detailed analysis of key issues identified by top global consulting firms, SMS Board discussions of pressing questions at the intersection of theory and practice, input from SMS IG&C leaders on top issues, consultation with leading global executives, and ongoing conversations with SMS members.

This intellectual agenda aims to be a living document to inspire and focus conversations between industry and academia that will evolve with the SMS community, the SMS’s scholarly publications, and the field of strategic management itself; it should serve as an inspiration to guide the development of actionable insight, frameworks, tools, and resources for the SMS community to bridge the worlds of scholarship and practice. As global issues continue to evolve, so will “The Big Six.”

The SMS will be launching and promoting “The Six Big Questions of Strategic Management” throughout 2023. These will be used as an organizing principle for SMS content and will be woven throughout various content channels including the new SMS website, webinars, the Explorer newsletter, and social media as we strive to continue to disseminate top research and make the SMS a destination for ground-breaking content in the field of strategic management.

# MEMBERSHIP



**ASEEM KAUL**  
2022  
MEMBERSHIP  
COMMITTEE  
CHAIR

## A REPORT BY ASEEM KAUL, 2022 MEMBERSHIP CHAIR

With the return of physical conferences in 2022 allowing us to interact with our membership face to face again (instead of virtually), the SMS Membership Committee continued to explore how best to engage our members, both online and in person. A key initiative for the year was to expand the membership of the committee itself – which had traditionally included only SMS Board members – to allow for wider representation and a more diverse set of perspectives. Following an enthusiastic response to calls for applications put out last year, I am delighted to welcome three new additions to the Membership Committee, who start their terms in January 2023: PhD Student representative Jessica Jeessoo Kim, IG&C Leadership representative Ignacio Canales, and DEI Committee representative Tracy Anderson. A huge thanks to all three (and everyone else who applied) for their willingness to serve in these important roles, and we look forward to adding exciting new member initiatives based on their feedback!

The past year also saw the full rollout of the SMS Member Circle initiative, with all IGs now having their individual Member Circles. These Circles are a great way for members to stay updated on the latest member events and news from the various IGs, as well as to share their own updates and ideas with like-minded peers. I strongly encourage you all to visit Member Circle if you haven't already. A special highlight for the Membership Committee was the launch of the PhD Student Circle – spearheaded by dynamic student champions Adeline Abou-Ali, Fabio Busicchia, Obinna Chinewubeze, Jessica Jeessoo Kim, and Mithira Siva – as part of a continued effort to engage more actively with PhD student members.

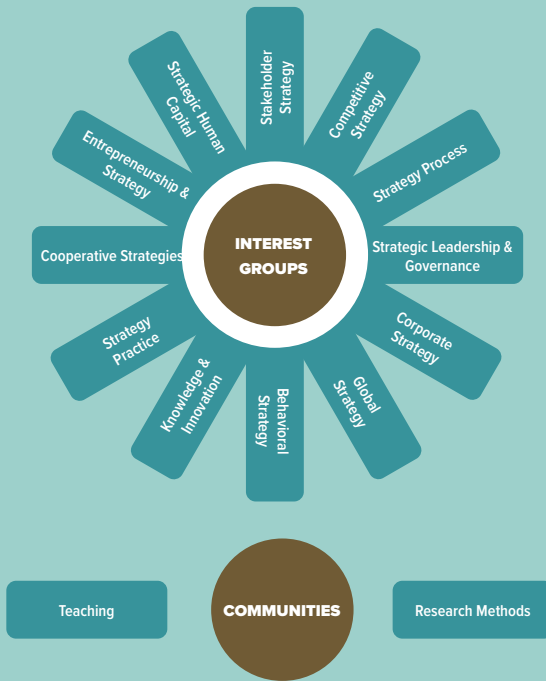
Our ever-popular Strategy Imagination Forums continued in 2022, featuring sessions on the virtual enterprise, ESG, and a broader vision of business that brought together academics and practitioners. Additionally, an exciting menu of member-generated online content was offered, including the ongoing Entrepreneurship & Strategy Insight webinars, Corporate Strategy Master Classes, and Conversations with the SMS Fellows, as well as a new virtual Doctoral and Junior Faculty Consortium organized by our Research Methods Community, and a heartwarming special tribute in memory of Will Mitchell. We expect to revive our PhD Chat series (which took a brief hiatus in 2022) next year and to continue exploring the potential for more region-specific activities. As always, feedback and suggestions from our members on additional initiatives and programs are welcome!

**KEY STATISTICS**

An infographic on a dark blue background. At the top, it says "KEY STATISTICS" in white. Below that, there are two circular icons. The first icon shows three stylized human figures in orange, with the number "3,000" in white and "MEMBERS" in orange below it. The second icon shows a globe with the number "74" in white and "FROM COUNTRIES" in orange below it.

## INTEREST GROUPS AND COMMUNITIES

The Interest Groups and Communities of the Strategic Management Society are a catalyst for member activities and are an excellent way to engage with SMS. The 12 Interest Groups are organized to recognize major streams of practice and research and to serve the needs of members in specific topic areas. The two Communities focus on providing resources and a forum for members to advance their skills. The IG&Cs' reach expanded considerably in 2022 with the full launch of the SMS Member Circle and with several IG&C-sponsored virtual engagement activities throughout the year.



## SMS MEMBER CIRCLE

The [SMS Member Circle](#) developed significantly in 2022, adding more circles for members to collaborate in. Circles now include all of the SMS Interest Groups and Communities, as well as a few more general topics, such as the PhD Student Circle, the SMS Journals, and several circles to assist in leadership of the Society. In 2023, the SMS Member Circle will be the primary method through which IG&C leaders will communicate with their IG&C members.

## SMS TECH TRANSFORMATION

The SMS Member Circle was launched in 2021 as the first phase of the Society's technology systems transformation. The project continued in 2022, with additional development of the SMS Member Circle, strategy and design work for a new SMS website, and contracting for a new association management system. The new website and association management system will launch in 2023, along with an improved email marketing platform and conference submission system. All of these systems are intended to create an enhanced member experience while also assisting SMS staff with operational needs.

## PHD STUDENT CIRCLE

In spring 2022, SMS launched the PhD Student Circle in collaboration with five PhD Student Champions. This group on the SMS Member Circle is an online doctoral community that serves as a platform for the PhD members of the Strategic Management Society to interact and network with each other. In addition, the Circle intends to assist PhD scholars by sharing information on the theories and methods commonly used in the field of strategic management. The PhD Circle also held a student networking lunch at the SMS 42nd Annual Conference.

## PHD CIRCLE CHAMPIONS



**Adeline Abou-Ali**  
University of Barcelona



**Fabio Busicchia**  
Polytechnic University of Milan



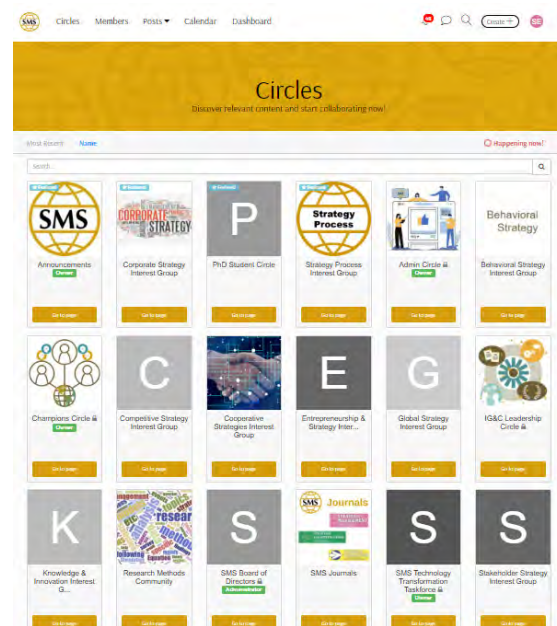
**Obinna Chinewubeze**  
ESSEC Business School



**Jessica Jeesoo Kim**  
University of California, Irvine



**Mithira Siva**  
IIM Ahmedabad



# PUBLICATIONS



**JULIAN BIRKINSHAW**  
2022 PUBLICATIONS COMMITTEE CHAIR

## A REPORT BY JULIAN BIRKINSHAW, 2022 PUBLICATIONS CHAIR

SMS has three top-quality journals that are central to its mission of fostering and supporting rigorous and practice-engaged strategic management research.

*Strategic Management Journal (SMJ)* continues to thrive as the top journal in its field, attracting 1,523 submissions from scholars around the world and publishing 98 papers. The journal published a special issue on “Strategies on Platform Ecosystems.” I would like to thank Sendil Ethiraj, who stepped down as Co-Editor in 2022. Mary Benner was appointed to join the continuing editors Rajshree Agarwal, Brian Silverman, and Vibha Gaba.

*Strategic Entrepreneurship Journal (SEJ)* continues to grow in visibility and is widely viewed as a premier outlet for work in entrepreneurship, entrepreneurial strategy, and innovation. *SEJ* published 29 papers in 2022 and had 507 submissions. There was a special issue on “Catalyzing Change and Innovation in Women’s Entrepreneurship.” I thank Gary Dushnitsky, who came to the end of his Co-Editor term. Yong Li was appointed to join Melissa Graebner and Peter Klein on the Co-Editor team.

*Global Strategy Journal (GSJ)* is also growing in stature, having been awarded “level four” status according to the highly regarded Academic Journal Guide (AJG) compiled by the Chartered Association of Business Schools (UK). During 2022, there were 308 submissions and 31 papers published. There were two special issues celebrating the 10th anniversary of the journal’s founding. I thank Ram Mudambi, who stepped down as Co-Editor, and I welcome Grazia Santangelo who joins the continuing team of Gabriel Benito and Alvaro Cuervo-Cazurra.

The Media Innovations (MI) initiative, led by Marvin Lieberman and Matthias Wenzel, made good progress in enhancing the dissemination of SMS research, through social media posts, video abstract promotion, and SMS Collections, which are bundles of previously published papers around a specific theme. SMS has some 9,000 followers on Twitter, 13,500 on LinkedIn, and 2,800 on YouTube, all significant increases from the previous year.

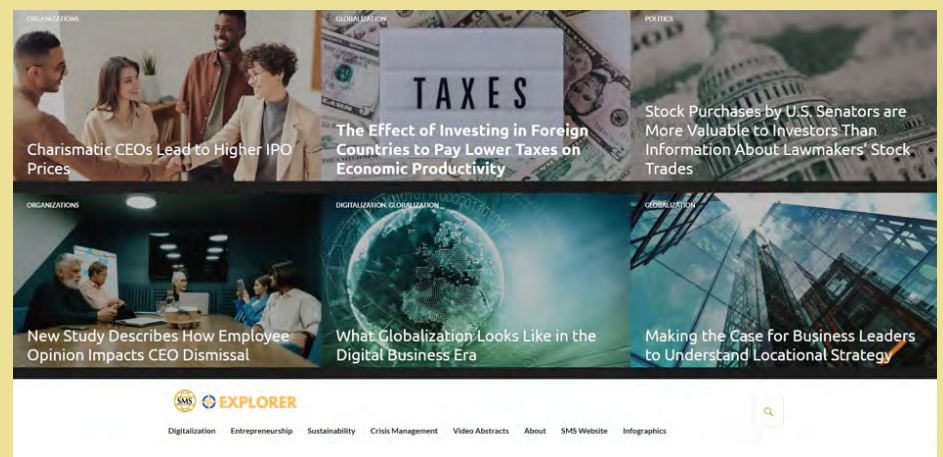
We continue to work with Wiley as the publisher of our three journals. We thank Barbara Grobicki and Lana Bandy for their work in managing that relationship and supporting the SMS Journals and the dissemination of the ground-breaking research being published.



The SMS Journal Co-Editors and Wiley present a “Meet the Editors” panel at SMS London

## SMS EXPLORER ONLINE

The SMS Office works with the Media Innovations team as well as freelance writers to convert research findings from the SMS Journals into SMS Explorer articles that managers can use to help their companies succeed. Graduate students also find the content useful as they learn about current important topics in strategic management, entrepreneurship, and global business. Academics can use [the site](#) to discover what their colleagues are researching and get an overview of articles before accessing the full Journal content online. New content is promoted through the Explorer newsletter distributed monthly.





# STRATEGIC MANAGEMENT JOURNAL

## A REPORT BY RAJSHREE AGARWAL, VIBHA GABA, & BRIAN SILVERMAN, 2022 SMJ CO-EDITORS



Rajshree Agarwal  
University of Maryland



Vibha Gaba  
INSEAD

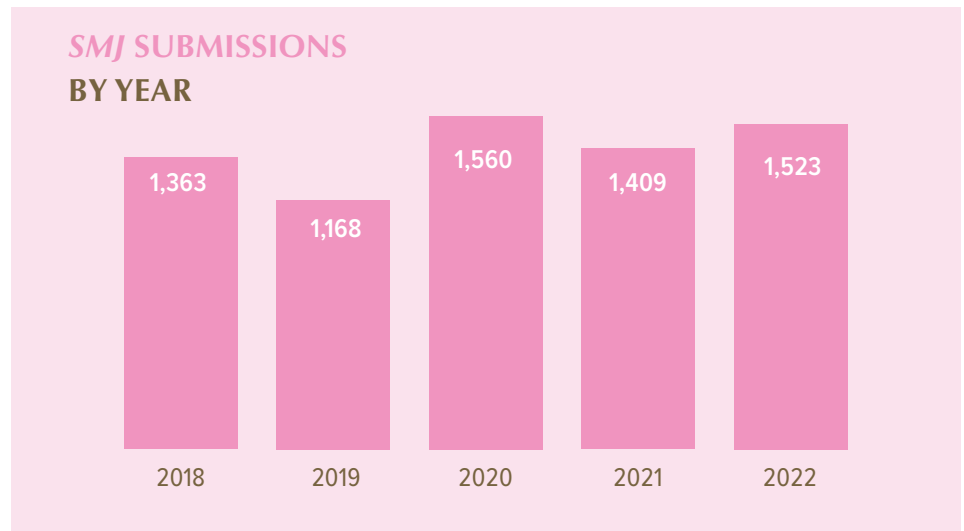


Brian Silverman  
University of Toronto

The *Strategic Management Journal (SMJ)* continues to thrive, attracting a high number of submissions in 2022 and continuing to publish leading research for the field.

The journal received 1,523 original submissions last year, so the Associate Editor team who saw the papers through the process and provided authors with developmental feedback were kept extremely busy. *SMJ* greatly appreciates the work of all of its Associate Editors. The journal welcomed Sun Hyun Park as a new Associate Editor. We also offer grateful appreciation to Associate Editors whose terms ended during 2022: Sharon Belenzon, Heather Berry, Aaron Chatterji, Rodolphe Durand, Emilie Feldman, Caroline Flammer, Aseem Kaul, Dovev Lavie, Tomasz Obloj, Andrew Shipilov, and Yan Anthea Zhang. At the Co-Editor level, Mary Benner was selected to join the team (as of January 2023), Rajshree Agarwal began her second term, and Sendil Ethiraj stepped down; we thank Sendil for his service to the journal.

In 2022, *SMJ* published the Special Issue “Strategies on Platform Ecosystems” (led by Tobias Kretschmer, Aija Leiponen, Melissa Schilling, and Gurneeta Vasudeva Singh) and prepared two more Special Issues for publication during 2023: “Question-driven and Phenomenon-based Empirical Strategy Research” (led by Melissa Graebner, Anne Marie Knott, Marvin Lieberman, and Will Mitchell) and “Renewing the Resource-based View” (led by Jay Barney, Olivier Chatain, Connie Helfat, Aseem Kaul, David Ketchen, and Harbir Singh). Finally, the Special Issue “Resource Allocation and Strategic Management” (led by Catherine Maritan and Brian Wu) is also in process.



The SMJ Co-Editors pose with Dan and Mary Lou Schendel Best Paper Prize recipient Constance Helfat at SMS London.

### DAN AND MARY LOU SCHENDEL BEST PAPER PRIZE

In 2022, *SMJ* honored Constance Helfat and Margaret Peteraf for their 2003 article “The Dynamic Resource-based View: Capability Lifecycles” from Volume 24, Issue 10. This outstanding paper is a seminal contribution to the capabilities and resource-based literatures. By introducing the concept of the capability lifecycle, this study facilitated the development of a dynamic resource-based theory – notably, through rigorous explication of the link between evolution of organizational capabilities and the existence of heterogeneity in resources across firms. These ideas have been enormously influential in strategic management; not surprisingly, this is one of the most highly cited articles published in *Strategic Management Journal* over the last 20 years. This article also appears on syllabi of graduate courses in strategy throughout the world.

# STRATEGIC ENTREPRENEURSHIP JOURNAL

## A REPORT BY GARY DUSHNITSKY, MELISSA GRAEBNER, & PETER KLEIN, 2022 SEJ CO-EDITORS



Gary Dushnitsky  
London Business  
School

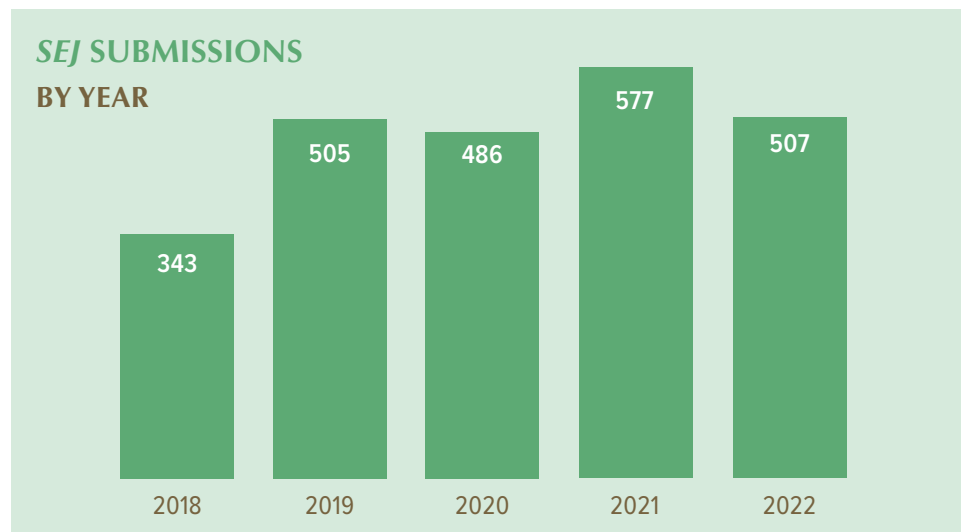


Melissa Graebner  
University of Illinois



Peter Klein  
Baylor University

The *Strategic Entrepreneurship Journal (SEJ)* was launched in 2007 with the goal of becoming a universally recognized “A” journal in the entrepreneurship field. During the last 15 years, the journal has continued to grow in influence, impact, and visibility. As a Financial Times 50, AJG 4 journal with an acceptance rate of 6.2%, *SEJ* is widely viewed as a premier outlet for work in entrepreneurship, entrepreneurial strategy, innovation, and related topics. Submissions have increased significantly over the last five years. In 2022, the journal received 507 new manuscript submissions, including 45 submissions for special issues. The editorial team remained strong under the leadership of Co-Editors Gary Dushnitsky, Melissa Graebner, and Peter Klein. Gary completed his second three-year term on December 31 and was replaced by Yong Li, who served as an Associate Editor for several years. The journal added five new Associate Editors — Markus Baer, Julio De Castro, Elena Kulchina, Peter Younkin, and Matt Mount — and said farewell to Gary Bruton, Benjamin Campbell, Anu Wadhwa, and Brian Wu. *SEJ* published 29 articles across four issues in 2022, including the June special issue, “Catalyzing Change: Innovation in Women’s Entrepreneurship,” guest-edited by Candida Brush, Kimberly Eddleston, Linda Edelman, Tatiana Manolova, Maura McAdam, and Cristina Rossi-Lamastra. Next year will feature three special issues, “Reframing Social Entrepreneurship Research,” “Leading the Digital Transformation of Incumbent Firms,” and “Environmental Change, Strategic Entrepreneurial Action, and Success.” The journal also continues to partner with Entrepreneur & Innovation Exchange (EIX) to develop practitioner-friendly summaries of selected *SEJ* content.



### SEJ BEST PAPER PRIZE

In 2022, *SEJ* honored Matthew Wood and William McKinley for their 2010 article, “The Production of Entrepreneurial Opportunity: A Constructivist Perspective” from Volume 4, Issue 1. In this highly influential article, the authors theorize how entrepreneurs engage peer feedback, social ties, and reputation to convert their idiosyncratic and often tacit ideas about market opportunities into actionable projects and ventures. As they put it, “Entrepreneurial opportunities emerge from the interplay between current enacted social structures, the entrepreneur’s cognitive evaluation of that reality, and the entrepreneur’s perceived ability to enact a new reality in the direction of an envisioned future.” They argue that the likelihood of a successful entrepreneurial outcome depends on the degree of consensus among knowledgeable peers about the entrepreneur’s idea, the entrepreneur’s access to preexisting social ties, and the entrepreneur’s reputation for past opportunity enactment. The authors also explore how entrepreneurs reimagine their original beliefs after abandoning a perceived opportunity in the middle of the process. The paper is a major contribution to the debate about the nature and utility of the opportunity construct in entrepreneurship research.

# GLOBAL STRATEGY JOURNAL

## A REPORT BY GABRIEL R.G. BENITO, ALVARO CUERVO-CAZURRA, & RAM MUDAMBI, 2022 GSJ CO-EDITORS



Gabriel R.G. Benito  
*BI Norwegian Business School*



Alvaro Cuervo-Cazurra  
*Northeastern University*



Ram Mudambi  
*Temple University*

The *Global Strategy Journal (GSJ)* had numerous achievements in 2022 and continued as the leading journal in global strategy. The Journal Citation Report released its new analyses for 2021, and *GSJ* had a 7.393 impact factor, which makes it a Q1 journal (performing better than at least 75% of journals in its category). The Academic Journal Guide classified *GSJ* as a level 4 journal the previous year.

At the Co-Editor level, Grazia Santangelo was selected to join the team (in 2023), and Ram Mudambi finished off his sixth year as a Co-Editor. We thank Ram for his valuable service. The journal welcomed Chang Hoon Oh and Stephanie Wang as new Associate Editors starting in 2022. We also offer grateful appreciation to long-time Associate Editor Lucia Piscitello, who we will miss tremendously, and who stepped down after six years.

*GSJ* continued its participation at conferences by joining meet-the-editor sessions, organizing paper development workshops and Oxford style panel debates (e.g., AIB, SMS), and sponsoring best paper awards (e.g., EIBA).

The four issues published in 2022 reflect *GSJ*'s goals of being a focused, high-quality journal shaping research conversations in global strategy. To celebrate the first decade of the journal, *GSJ* published two Decade Celebration special issues. These contain articles by thought leaders in strategic and international management that reflect on the past and future of key themes in global strategy. The two regular issues include articles grouped around common themes, one on innovation and learning and another on contextual influences on strategy. Looking ahead, *GSJ* will publish a Special Issue on "Complexity and Multinationals" (edited by Julian Birkinshaw, Marcus M. Larsen, Yue Maggie Zhou, and Gabriel R.G. Benito) in 2023 and one on "Ownership and Global Strategy" (edited by Geoffrey T. Wood, Anna Grosman, Michael J. Mol, and Alvaro Cuervo-Cazurra) in 2024.

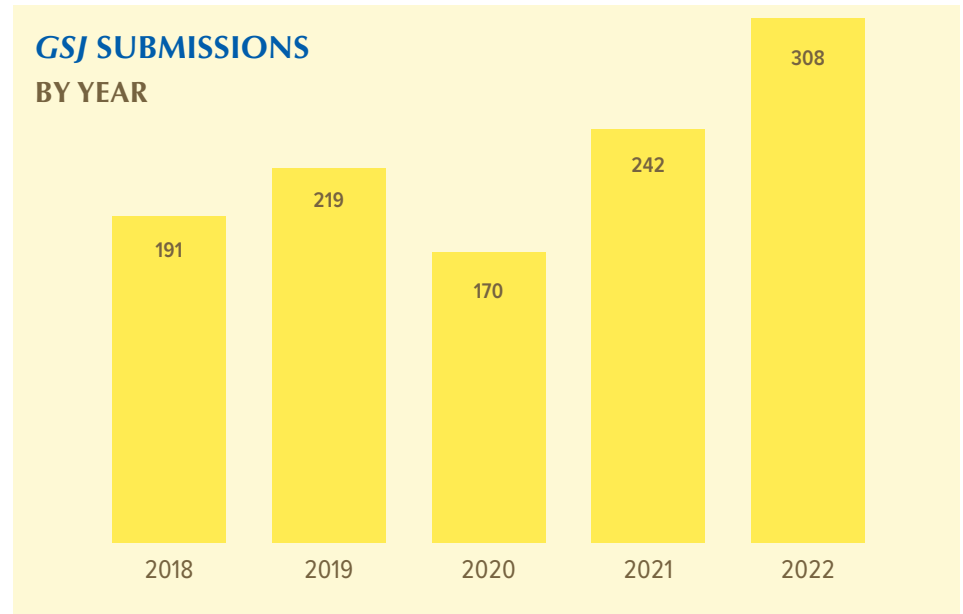
The editorial team has a goal of continuous improvement of the journal's academic relevance and status and expects *GSJ*'s second decade will witness even greater achievements.



*GSJ Best Paper Prize recipient John Paul MacDuffie with GSJ Co-Editor Ram Mudambi at SMS London*

### GSJ SUBMISSIONS

#### BY YEAR



### GSJ BEST PAPER PRIZE

In 2022, *GSJ* honored John Paul MacDuffie for the 2013 article "Modularity-as-property, Modularization-as-process, and 'Modularity'-as-frame: Lessons from Product Architecture Initiatives in the Global Automotive Industry" from Volume 3, Issue 1. This is an impactful paper that opens new ground on the study of modularity in global technology strategy and builds insights from the analysis of the automobile industry.

# CONFERENCES



**YAN  
ANTHEA  
ZHANG**

**2022  
CONFERENCE  
COMMITTEE  
CHAIR**

## A REPORT BY YAN ANTHEA ZHANG, 2022 CONFERENCE CHAIR

We continued to adapt to new environments as the world was gradually getting out the shadow of the Covid-19 pandemic. In 2022, SMS returned to in-person conferences for the SMS Special Conference in Milan and the SMS 42nd Annual Conference in London, after two virtual annual conferences in 2020 and 2021. The Annual Conference received 1,420 submissions and welcomed 1,286 attendees. The Special Conference had 171 submissions and was attended by 158 people. Both conferences featured classic plenary panels and paper sessions as well as more innovative meeting formats designed to engage scholars with practitioners.

In early 2022, the Conference Committee appointed [Program Chairs](#) to lead the SMS 43rd Annual Conference, which will be held in Toronto September 30–October 3, 2023. The conference theme, developed by the Program Chairs, of “Aligning Strategy, Corporate Governance, and Resource Allocation in Turbulent Environments” is designed to facilitate conversations between scholars from different disciplines (e.g., strategy and finance) as well as to continue to bridge the gap between academic research and business practices. We hope you will join us in Toronto.

A priority of the Conference Committee in 2022 was to reinvigorate Special Conferences after the pandemic had limited our ability in hosting them. An open Call for Proposals was held for SMS Special Conferences, which was well received by our members. We are very proud to share with you that conversations are ongoing with several institutions worldwide for future Special Conferences, which can strengthen the SMS’s strategic priorities — practitioner strategy and geographic expansion. We look forward to announcing upcoming Special Conferences in 2023.



### SMS LONDON KEY STATISTICS

**1,420**  
PROPOSAL  
SUBMISSIONS

**1,346**  
REVIEWERS

**1,286**  
REGISTRANTS

**223**  
CONFERENCE  
SESSIONS



### SMS MILAN KEY STATISTICS

**171**  
PROPOSAL  
SUBMISSIONS

**135**  
REVIEWERS

**158**  
REGISTRANTS

**36**  
CONFERENCE  
SESSIONS

# SMS SPECIAL CONFERENCE IN MILAN



Silvia Candiani  
*Microsoft Italy*



Alessandro Minichilli  
*Bocconi University*



Riccardo Monti  
*Boston Consulting Group*



Carlo Salvato  
*Bocconi University*



Mary Tripsas  
*UC Santa Barbara*

## A REFLECTION BY SILVIA CANDIANI, ALESSANDRO MINICHILLI, RICCARDO MONTI, CARLO SALVATO, AND MARY TRIPSAS, PROGRAM CHAIRS FOR THE SMS SPECIAL CONFERENCE IN MILAN

The intent of the SMS Special Conference in Milan, hosted in June 2022, was to deepen our understanding and advance possible solutions for the relevant issues raised by the progress of the Digital Era. Fast-paced innovation and technological breakthroughs are changing the way society, business, and technology relate to each other, requiring new ways of thinking and operating. The conference represented a valuable moment of discussion around these topics, thanks to high-quality, thought-provoking, and practice-relevant research. To this end, we are happy to have achieved one of the main goals of the conference, which was to foster a tight collaboration between practitioners and academics. This was accomplished through the innovative format of LABs and Interactive Multimedia Roundtables, two new session formats for SMS that bring business leaders into the session to allow for the development of solutions to real problems and challenges of the Digital Era.

SMS Milan was the first SMS Conference to be able to meet in person after the pandemic, and it was wonderful to see everyone gather on the new SDA Bocconi campus! Thank you to the SMS Executive Office staff and our wonderful Track Chairs for your support and efforts in making SMS Milan a memorable success.

CONFERENCE  
SPONSOR

SDA Bocconi  
SCHOOL OF MANAGEMENT



# SMS 42<sup>ND</sup> ANNUAL CONFERENCE



Jamie Cattell  
*IBM Corporation*



Anu Wadhwa  
*Imperial College  
London*



Richard Whittington  
*University of Oxford*

## A REFLECTION BY JAMIE CATTELL, ANU WADHWA, & RICHARD WHITTINGTON, PROGRAM CO-CHAIRS FOR THE SMS 42ND ANNUAL CONFERENCE

The SMS 42nd Annual Conference was held September 17-21, 2022, in London. It was the first in-person conference since 2019 and had a record 1,286 conference registrants – the highest number of registrations for an in-person SMS Annual Conference to date. The conference took place during the time of Queen Elizabeth II’s funeral, resulting in some last-minute changes to the conference schedule. The understanding of conference attendees who experienced scheduling disruptions was greatly appreciated.

The conference theme was “Innovative Strategies for an Open World,” and it drew 1,420 proposal submissions. The conference Competitive Program featured 110 Paper, 44 Common Ground, and 17 Panel sessions. Additionally, the Interest Groups and Communities hosted 11 Workshops and 36 topical IG&C Sessions. Plenary Sessions included: a panel discussion on Strategy in the Age of Technology Disruption with speakers from IBM, Innovate Finance, University of Warwick, and University of Cambridge; a discussion of Open Strategy by leaders from London Business School, University of Innsbruck, and Boston Consulting Group; and a welcome address and distinguished panel on Grand Challenges and Business Strategy with leaders from Shell’s Energy Transition and Sustainability Strategy Division, Club of Rome, United Nations Global Compact, and Imperial College London. Dame Vivian Hunt received the Lifetime Achievement Award, the first-ever female honoree, and she presented a keynote on insights from her career as a strategic counsellor, followed by a discussion with a panel of distinguished scholars.

The conference took advantage of its in-person nature with many networking opportunities: several IG&C Socials; Receptions on Saturday and Monday evenings; the Tuesday Night Event at the Natural History Museum, sponsored by Imperial College Business School; the 4th Annual Women’s Networking Social; Diversity, Equity, and Inclusion Discussion Tables; the PhD Student Circle LIVE; Coffee Breaks; Lunches; and an always-open Conference Lounge.

Awards and Honors recipients were announced throughout the conference, including the inaugural Responsible Research Paper Prize. We are extremely grateful to the SMS staff for the impeccable organization, sometimes in the face of last-minute rescheduling, to the Track Chairs for an amazing conference program, and to the attendees for their enthusiasm.

## TUESDAY NIGHT EVENT

Due to business and road closures on the day of Queen Elizabeth II’s funeral, the “Monday Night Event” offsite reception became the “Tuesday Night Event” for the first time in SMS history! The Natural History Museum hosted a grand evening, with generous support by Imperial College Business School. Despite the last-minute date change, the event was well attended, and attendees mingled and enjoyed drinks and hors d’oeuvres in one of Britain’s most striking examples of Romanesque architecture.



## CONFERENCE SPONSORS



# SMS 42<sup>ND</sup> ANNUAL CONFERENCE



A conference presenter delivers their proposal presentation during a Paper session.



Rita Gunther McGrath, 2022 SMS CK Prahalad Award recipient, greets Eric Zhao, 2022 SMS Emerging Scholar Award recipient.



Robert Grant, SMS member and Fellow, chats with fellow attendees at the Welcome Reception.



Presenting authors engage in discussion with audience members during a Common Ground session.



Discussant Shaker Zahra speaks during the plenary session and Lifetime Achievement Award presentation as 2022 honoree Dame Vivian Hunt and other session participants look on.

## CONFERENCE BEST PAPER PRIZE

### Changing the System, Not the Seeker

Amisha Miller, *Boston University*

## CONFERENCE PHD PAPER PRIZE

### When Uber Eats its Own Business, and its Competitors' too: Platform Diversification and Cross-platform Cannibalization

Hyuck David Chung, *University of Michigan*

Yue Maggie Zhou, *University of Michigan*

Christine Choi, *University of North Carolina*

### Combating Sociopolitical Spillover with Countervailing Claims: Evidence from Charlottesville

William Hurst, *University of Michigan*

### Demand for Technologies and Direction of Research: The Roles of Intellectual Distance and Research Quality

Jino Lu, *University of Southern California*

### Changing the System, Not the Seeker

Amisha Miller, *Boston University*

### Behavioral Experiments on Attention to Multiple Goals: Timing and Relationship Between Goals Affect Performance

Ann Xavier, *ETH Zurich*

Daniella Laureiro-Martinez, *ETH Zurich*

## CONFERENCE RESEARCH METHOD PAPER PRIZE

### Eye-tracking Analysis of a Managerial Decision-making Process

Juan-Pablo Torres, *University of Chile*

Andrés Musalem, *University of Chile*

Alejandro Hirmas, *University of Amsterdam*

## RESPONSIBLE RESEARCH PAPER PRIZE

The new Responsible Research Paper Prize was launched at SMS London. This award recognizes a conference paper that best meets the goals of RRBM, with a special emphasis on papers that involve stakeholders such as organizations, policy makers, managers, and consultants, other than academic scholars.

The inaugural prize was presented to:

### Combating Sociopolitical Spillover with Countervailing Claims: Evidence from Charlottesville

William Hurst, *University of Michigan*

## SRF AT SMS LONDON

At the SMS 42nd Annual Conference, a full-day mentoring workshop was held for the 2021 Dissertation Scholars, featuring mentoring sessions, an Editor's Panel, and a networking reception. The 2020 Dissertation Scholars displayed the outcomes of their funded research on posters during coffee breaks on the Monday of the conference.

# GRANT FUNDING BY THE STRATEGY RESEARCH FOUNDATION (SRF)

## A REPORT BY MICHAEL LEIBLEIN & CATHERINE MARITAN, 2022 SRF CO-CHAIRS



Michael Leiblein  
Ohio State University



Catherine Maritan  
Syracuse University

The Strategy Research Foundation (SRF) contributes to the field of strategic management by supporting SMS members' research activities. In 2022, the SRF operated three competitive grant programs: the Research in Organizations Program (RiO), the Research in Strategic Management Program (RSM), and the Will Mitchell Dissertation Research Grant Program (WMDRG), which was renamed to honor Professor Will Mitchell in early 2022 in recognition of his contributions to the SMS and the education of doctoral students in strategic management.

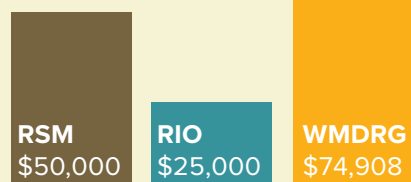
Program Director Tammy Madsen and Associate Program Director Giada Di Stefano guided the WMDRG Program and led a set of experienced scholars from around the world in reviewing 42 dissertation grant proposals from doctoral students at 34 institutions in 12 countries. Nine of these students were named 2022 Dissertation Research Scholars, and each of these students was awarded funding of up to \$10,000 to support their research activities. At the SMS 42nd Annual Conference in London, the Dissertation Research Grant Program returned to its in-person mentoring activities. The 2020 and 2021 Dissertation Scholars convened to engage with mentors, network, and display outcomes of their funded research.

The SRF has two programs that fund faculty research, the RiO Program directed by Riitta Katila and the RSM Program directed by Jackson Nickerson. RiO projects require researchers to collaborate with managers of an organization to study a strategic management issue in that organization. RSM projects address a specific theme central to the field of strategic management, which for 2022 was "Competitive Advantage in the 21st Century." After peer review by senior scholars, one RiO and two RSM proposals were selected for funding of up to \$25,000.

At the end of 2022, several members of the SRF team concluded their service. Michael Leiblein completed his second term as an SRF Co-Chair; he will be succeeded in that role by Mahka Moeen. Two Program Directors have also stepped down. After more than six years of leadership, Tammy Madsen has left the WMDRG program to take on new professional responsibilities. RiO Program Director Riitta Katila was elected to the SMS Board and has, therefore, left her SRF role. New Program Directors will be announced in early 2023.

### GRANT AMOUNTS AWARDED IN 2022

TOTAL \$149,908



### NEW SRF GRANT DISBURSEMENT POLICY

Recipients of 2022 SRF Grants will be the second cohort of scholars to receive their full grant payments upfront rather than through reimbursements over the course of the grant period. This change resulted in less cumbersome policies and greater flexibility while also providing the opportunity for SMS to create a more collaborative relationship with grant recipients and to promote the benefit and impact of SRF funding to a wider audience.

### 2022 GRANT RECIPIENTS

#### WILL MITCHELL DISSERTATION RESEARCH GRANT PROGRAM

**Daphne Baldassari**, *University of Toronto*  
Designing Gender Equity: Strategic Responses to Structural Diversity Interventions

**Susie Choe**, *University of Michigan*  
Identity-based Competition: How Identities Shape Producers' Market Opportunities and Constraints

**Deirdre Coveney**, *University of Warwick*  
Creating or Inflating Growth: Are Secondary Buyouts and Board Interlocks used to Increase or Inflate Investment Deal Values?

**Der-Ting Huang**, *University of Illinois at Urbana-Champaign*  
Essays on Location Strategies, Institutions, and Knowledge Management

**Tom (Hee Yeul) Kwon**, *University of Southern California*  
Navigating Technological Uncertainty in Industry Emergence

**Jino Lu**, *University of Southern California*  
Three Essays on Market Innovation Dynamics

**Sanghyun Park**, *INSEAD*  
Microfoundations of Organizational Learning

**Eppa Rixey**, *Massachusetts Institute of Technology*  
Small Business Regulatory Influence: A Mixed-methods Study of United States Craft Breweries

**Haifeng Wang**, *University of Wisconsin-Madison*  
How Firm Use of Non-compete Agreements Affects Employee Mobility and Entrepreneurial Choice: Reputation Spillover Effects Using Text Analysis

#### RESEARCH IN ORGANIZATIONS GRANT PROGRAM

**Christina Kryprianou**, *IE University*  
Designing, Launching, and Scaling Actor-oriented Organizations

#### RESEARCH IN STRATEGIC MANAGEMENT GRANT PROGRAM

**Navid Asgari**, *Fordham University*  
Studying Knowledge Decay in Organizations Using Knowledge Fingerprinting & Perishability Algorithms

**Dovev Lavie**, *Bocconi University*  
Coping with the Expiration of Competitive Advantage in the 21st Century



# AWARDS & HONORS

The SMS Awards and Honors Program recognizes individuals who have had a profound influence on the strategic management field through scholarly research, teaching, or service. The Awards & Honors Committee of the Board oversees the selection of award recipients, this year utilizing Award Selection Committees to provide input from relevant community stakeholders during the the review of candidates and make a recommendation for who would be recognized. The time and efforts of these selection committee members are appreciated. Along with the awards on this page, the Society recognizes scholars for work published in each of the SMS Journals more than five years ago that has had a lasting impact on the field. Additionally, SMS recognizes research presented during conference programs – the SMS 42nd Annual Conference recognized recipients for the Best Paper Prize, the Research Methods Paper Prize, the PhD Paper Prize, and the inaugural Responsible Research Paper Prize. The SMS Awards were presented at SMS London by Past-President Javier Gimeno.

## CK PRAHALAD DISTINGUISHED SCHOLAR-PRACTITIONER AWARD

**RITA D. GUNTHER-MCGRATH, COLUMBIA UNIVERSITY**



This award was created to honor the legacy of CK Prahalad, and it recognizes excellence in the application of theory and research in practice. This award honors a scholar-practitioner who has used applied learning to influence how theory and research guide practice. SMS was pleased to honor Rita Gunther McGrath as the 2022 recipient of the CK Prahalad Distinguished Scholar-Practitioner Award. She was recognized at the SMS Annual Conference in London.

## SMS EDUCATIONAL IMPACT AWARD

**IDALENE KESNER, INDIANA UNIVERSITY**



This award recognizes excellence in contributing to the teaching mission in strategic management. It is given annually to an individual who has made an exemplary contribution to quality and innovation in the teaching of strategic management, either through their own teaching and mentoring activities and/or by empowering other teachers with innovations and high-quality teaching materials. Idalene Kesner, the 2022

recipient of the SMS Educational Impact Award, has had a tremendous impact on teaching in the field of strategic management.

## SMS EMERGING SCHOLAR AWARD

**ERIC YANFEI ZHAO, INDIANA UNIVERSITY**



SMS awards this recognition annually to a relatively young or new scholar who displays exemplary scholarship that promises to have an impact on future strategic management practice. Recipients of the award will make fundamental contributions to the way we think about knowledge essential to achieving durable organizational success. Eric Zhao was the 2022 recipient of the SMS Emerging Scholar Award.

## SMS SERVICE AWARD

**MARGARETHE WIERSEMA, UNIVERSITY OF CALIFORNIA, IRVINE**



This award is conferred in recognition of significant and enduring service to the Strategic Management Society and its members. Recognized contributions may be from volunteered or compensated work, but will be significant and effective service to the Society. SMS was honored to present Margarethe Wiersema with the SMS Service Award in 2022.

## SMS LIFETIME ACHIEVEMENT AWARD

**DAME VIVIAN HUNT, FORMERLY OF MCKINSEY & COMPANY**



This award is intended to honor the highest level of achievement in strategic management by a business leader. The honoree is invited to give a lecture at the SMS Annual Conference, discussing their achievements in strategy. The Conference Program Chairs were honored to present Dame Vivian Hunt with the 2022 SMS Lifetime Achievement Award at the SMS Annual Conference in London.

# FELLOWS



**AKS ZAHEER**  
2022 DEAN OF  
FELLOWS

## A REFLECTION BY AKS ZAHEER, 2022 DEAN OF FELLOWS

For the first time in three years, the Fellows met in person at the 42nd SMS Annual Conference in London in September 2022. We greatly enjoyed the face-to-face conviviality over dinner and were able to hand over Membership certificates to Fellows inducted over the past three years. Thirty-five Fellows attended the meeting (47% of Active Fellows).

The “Conversations with the SMS Fellows” series, designed to showcase Fellows and guests discussing central issues at the forefront of strategic management research and practice, continued in 2022. Webinars were held on the social purpose of business at the firm level, featuring Ranjay Gulati, with Laurence Capron as discussant, and on rethinking the role of capitalism, featuring Rebecca Henderson with Rajshree Agarwal as discussant. Aks Zaheer moderated both sessions. These virtual events were well attended, as was a live Conversations with the SMS Fellows seminar at the 2022 SMS Annual Conference in London; it featured David Teece, with Jackson Nickerson and Margarethe Wiersema as discussants and Jeff Reuer as moderator.

Several new Fellows were inducted in 2022: Ron Adner, Mary Benner, Riitta Katila, and Todd Zenger. Hearty congratulations on achieving this distinction! Our gratitude also goes to the hardworking Fellows Membership Committee, comprised of (in order of their seniority on the committee): Nicolai Foss (Chair), Jim Westphal, Laurence Capron, Amy Hillman, Chris Zott, Julian Birkinshaw, Sea-Jin Chang, and Melissa Graebner. Several SMS Fellows earned kudos and were honored with SMS awards: Connie Helfat and Margie Peteraf were awarded the Dan and Mary Lou Schendel Best Paper Prize, Rita Gunther McGrath was awarded the CK Prahalad Award for Scholarly Impact on Practice, and Margarethe Wiersema received the SMS Service Award. Congratulations to all!

I am most saddened to note the passing of SMS Fellows Jose de la Torre and Andy Van de Ven in 2022. Both were outstanding contributors to the academic and social lives of our field. We shall miss them dearly. On behalf of the Fellows, I extend our deepest condolences to their families. In closing, as Jeff Reuer transitions to Dean of the Fellows and Laurence Capron to Deputy Dean, I wish them a successful run, and to all the Fellows, a productive and healthy year ahead!

### 2022 DEAN OF THE FELLOWS

**Aks Zaheer**  
*University of Minnesota*

### 2022 DEPUTY DEAN OF THE FELLOWS

**Jeffrey Reuer**  
*University of Colorado, Boulder*

### NEW FELLOWS

**Ron Adner**, *Dartmouth College*

**Mary Benner**, *University of Minnesota*

**Riitta Katila**, *Stanford University*

**Todd Zenger**, *University of Utah*

Please visit the [Fellows Directory](#) for a full list of the SMS Fellows.



*Margarethe Wiersema presents during the Conversations with the SMS Fellows session at SMS London.*

# TREASURER'S REPORT 2022

## A REPORT BY CRAIG CROSSLAND, 2022 SMS TREASURER



**CRAIG  
CROSSLAND**  
2022 SMS  
TREASURER

The financial performance of SMS is governed by the SMS Board of Directors, with the Finance Committee providing oversight of the budget, finances, and investments. The Finance and Executive Committees and the Board meet regularly throughout the year to review financial performance and to review and approve the audited financial statements, tax filings, and annual budget. The Society's financial statements are developed by the Executive Director, audited by an independent auditing firm, and approved by the Board of Directors. Revenue and expenses are reported on a modified cash basis. The corresponding amounts for 2020 and 2021 are included here for reference. Please note that the 2022 figures presented here are unaudited as of the date of publication.

### Operating Performance

The fiscal year ending December 31, 2022, was marked by a return to pre-pandemic trends for operating performance. Program income for 2022 increased to \$2,280,715, which was substantially higher than the pandemic-affected years of 2021 (\$1,322,995) and 2020 (\$1,217,254). This overall increase in program revenues was largely the result of an increase in revenues from conference registration fees due to a return to a live format (2022: \$1,238,558; 2021: \$311,665). Membership income rose 6.0%, while journal royalties fell 2.0%.

Operational and administrative costs also rose considerably in 2022, again largely due to the Society's return to an in-person conference. Overall program operating and administrative expenses were \$2,070,014, resulting in a net operating surplus for 2022 of \$210,701 (9.2%). This represents another laudatory performance by the SMS staff, especially in light of the ongoing uncertainty posed by the aftermath of the pandemic and the current inflationary environment.

There was also \$195,764 in one-time miscellaneous revenue, from a pandemic-related insurance payout related to the cancellation of the SMS Hangzhou conference, and an Employee Retention Tax Credit (ERTC) from the Internal Revenue Service.

### Investment Performance

SMS's investment portfolio is managed by Vanguard Institutional Advisory Services, under the supervision of the Finance Committee and in line with the investment policy approved by the SMS Board. Similar to many organizations and individuals around the world, our investment portfolio was negatively affected in 2022 by global economic conditions, with the overall SMS investment portfolio decreasing in value by \$1,161,652 (12.2%). For comparison, the S&P 500 benchmark index ended 2022 with a 19% loss. Although this decrease is unfortunate, the SMS investment portfolio

remains robust. It continues to be invested conservatively, with funds held in index mutual funds comprised of fixed income and equities, and we rely upon conservative investment draw policies that are designed to smooth out variations in the size of the portfolio over time (see below for details).

### Investment Draw for Programs

Consistent with its Investment Policy Statement, SMS made an investment draw from its total assets to support the Strategic Research Foundation and SMS program operations. The formula used to calculate the annual investment draw is 4% of the trailing 12-quarter average of the unrestricted portion of the portfolio (directed toward operations), plus 5% of the trailing 12-quarter average of the restricted portion of the portfolio (directed toward research funding). The total investment draw in 2022 was \$340,016 (\$279,966 in 2021).

### Grants, Awards, and Total Assets

SMS continued its various grant and award programs in 2022. A total of \$254,927 was distributed through the three Strategy Research Foundation (SRF) grant programs and the annual SMS awards program. Of note, SRF grants are now distributed in full to successful applicants upon approval. This change, which was approved by the Finance Committee and the Board, is designed to streamline access to funds by recipients and reduce the administrative burden on SMS staff, allowing for a future focus on celebrating the SRF scholars' ground-breaking research.

Overall, SMS ended 2022 in a strong financial position, even in light of the global economic challenges experienced throughout the year. The Society's end-of-year total assets of \$8,365,800 are higher than every year except 2020 and 2021; these assets provide a solid basis for the Society in the coming years. Looking ahead, SMS continues to steward resources carefully to ensure the ongoing strength of the Society. As this is my first year in the role of SMS Treasurer, I would like to take this opportunity to thank my predecessor, Tomi Laamanen, both for his assistance during my transition and for his exceptional work in this role over the previous six years.



SMS thanks Tomi Laamanen  
for his years of service as  
the SMS Treasurer.

## REVENUE AND EXPENSES

2022 figures unaudited at time of publication

2022

2021

2020

### I. REVENUE

1. Investment Draw for Programs	\$ 340,016	\$ 279,966	\$ 454,847
2. Misc Revenue	\$ 195,764	\$	\$
3. Program Income			
Membership Dues	\$ 468,353	\$ 441,952	\$ 404,865
Sponsorships	\$ 19,933	\$ 8,834	\$ 11,267
Conference Reg Fees	\$ 1,238,558	\$ 311,665	\$ 226,205
Royalties and Publication Services	\$ 549,100	\$ 560,543	\$ 574,917
Job Board	\$ 4,771	\$	\$
<b>Total Program Income</b>	<b>\$ 2,280,715</b>	<b>\$ 1,322,994</b>	<b>\$ 1,217,254</b>
<b>Total Revenue</b>	<b>\$ 2,816,495</b>	<b>\$ 1,602,960</b>	<b>\$ 1,672,101</b>

### II. EXPENSES

4. SRF Grants			
Research Grants	\$ 216,222	\$ 60,904	\$ 109,607
<b>Total SRF Programs</b>	<b>\$ 216,222</b>	<b>\$ 60,904</b>	<b>\$ 109,677</b>
5. Program Operation & Admin			
Awards & Prizes	\$ 38,705	\$ 36,852	\$ 34,565
Office Staffing	\$ 708,013	\$ 719,548	\$ 598,365
Technology	\$ 309,638	\$ 131,201	\$ 144,747
Membership Services/Subscriptions	\$ 108,458	\$ 105,000	\$ 105,000
Conference Operations	\$ 638,923	\$ 51,086	\$ 190,833
Journals	\$ 12,652	\$ 3,931	\$ 7,650
Meetings & Travel	\$ 24,831	\$ 2,532	\$ 6,657
Facilities & Equipment	\$ 51,177	\$ 50,056	\$ 46,793
Operations & Other	\$ 104,735	\$ 112,277	\$ 67,015
Services (legal, audit, consulting, insurance)	\$ 72,882	\$ 61,911	\$ 105,862
<b>Total Program Operation &amp; Admin</b>	<b>\$ 2,070,014</b>	<b>\$ 1,274,394</b>	<b>\$ 1,307,487</b>
<b>Total Expenses</b>	<b>\$ 2,286,236</b>	<b>\$ 1,335,298</b>	<b>\$ 1,417,095</b>

**III. CHANGE IN NET OPERATING ASSETS** **\$ 530,259** **\$ 267,662** **\$ 255,006**

### IV. OTHER INCOME AND EXPENSES

6. Other Income			
Earnings from Investments	\$ (1,351,895)	\$ 805,924	\$ 1,105,874
Waiver Income - Non-Cash	\$	\$	\$ 13,005
<b>Total Other Income</b>	<b>\$ (1,351,895)</b>	<b>\$ 805,924</b>	<b>\$ 1,118,879</b>
7. Other Expense			
Investment Draw from Reserves	\$ 340,016	\$ 279,966	\$ 454,847
Waiver Expense - Non-Cash	\$	\$	\$ 13,005
<b>Total Other Expenses</b>	<b>\$ 340,016</b>	<b>\$ 279,966</b>	<b>\$ 467,852</b>

**V. NET OTHER ACTIVITIES** **\$(1,691,910)** **\$ 525,958** **\$ 651,027**

**VI. CHANGE IN NET ASSETS** **\$(1,161,652)** **\$ 793,621** **\$ 906,032**

### ASSETS AT END OF PERIOD

	<b>2022</b>	<b>2021</b>	<b>2020</b>
Unrestricted	\$ 4,759,982	\$ 5,012,411	\$ 4,493,027
Board Designated Restricted			
Set Aside for Research Funding	\$ 3,600,731	\$ 4,509,954	\$ 4,235,718
Current Liabilities	\$ 5,087	\$ 3,792	\$ 3,972
<b>Total Assets at End of Period</b>	<b>\$ 8,365,800</b>	<b>\$ 9,526,157</b>	<b>\$ 8,732,717</b>

# VOLUNTEERS

SMS would like to thank all its volunteers for the dedication and commitment that made the 2022 activities possible. SMS volunteer positions are an excellent opportunity for members to make an impact both within the Society and in the field of strategic management.

## SMS MEMBERS ON BOARD COMMITTEES

### AWARD SELECTION COMMITTEES

Africa Ariño, *IESE Business School*  
Jonathan Bundy, *Arizona State University*  
Protiti Dastidar, *University of Maryland*  
Irene Duhaime, *Georgia State University*  
Rodolphe Durand, *HEC Paris*  
Kathleen Eisenhardt, *Stanford University*  
Vibha Gaba, *INSEAD*  
Javier Gimeno, *INSEAD*  
Melissa Graebner, *University of Illinois at Urbana-Champaign*  
Rita D. Gunther-McGrath, *Columbia University*  
Donald Hambrick, *Pennsylvania State University*  
Constance Helfat, *Dartmouth College*  
Riitta Katila, *Stanford University*  
Nandini Lahiri, *American University*  
Gwendolyn Lee, *University of Florida*  
Jackson Nickerson, *Washington University in St. Louis*  
Jan Rivkin, *Harvard University*  
George Stalk Jr, *Boston Consulting Group*  
Heli Wang, *Singapore Management University*

### DEI COMMITTEE

Tracy Anderson, *Bocconi University*  
Jose Arrieta, *University of Amsterdam*  
Craig Crossland, *University of Notre Dame*  
Roberto Gamarra, *Gallaudet University*  
Norris Gunby, *Fayetteville State University*  
Iman Hemmatian, *Cal Poly Pomona*  
Ga-Young Jang, *H&Consulting*  
Gwendolyn Lee, *University of Florida*  
Sharon Matusik, *University of Michigan*  
Maximilian Palmié, *University of St. Gallen*  
Heli Wang, *Singapore Management University*

### TECHNOLOGY TRANSFORMATION TASKFORCE

Taek Chung  
Tunde Cserpes, *Aarhus University*  
Giada Di Stefano, *Bocconi University*  
Ann-Kathrin Herfeld, *WU Vienna*  
Aseem Kaul, *University of Minnesota*  
Dongwook Kim, *North Dakota State University*  
Sergio Lazzarini, *Western University*  
Shenghui Ma, *Fudan University*  
Paul Mang, *Guidewire Software*  
Matthias Wenzel, *Leuphana University of Lüneburg*

## INTEREST GROUPS AND COMMUNITIES

### BEHAVIORAL STRATEGY

#### CHAIR

Gerry McNamara, *Michigan State University*

#### PROGRAM CHAIR

Vibha Gaba, *INSEAD*

#### ASSOCIATE PROGRAM CHAIR

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2022 saw the creation of several new volunteer opportunities for SMS Members, including serving on Board Committees to provide additional perspectives, serving on Award Selection Committees, and other positions. Interested members should check the [Volunteer page](#) of the SMS website to learn about open positions and how to apply throughout the year.

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